Health Claims for Auto Insurance

INSURER USER MANUAL

Chapter 10

Insurer User Management

June 2014

Chapter 10: Insurer User Management

OVERVIEW

User Management involves the setup and maintenance of individual Users within HCAI. Users are assigned roles and domains within HCAI that define what a User can do and where they can do it. Roles are defined as a set of tasks that a User can perform. Each task represents a User's interaction with the HCAI web application. Domains specify where the tasks are performed or, more simply, the place within an Insurer organization where the claim information is located. For more information on the structure of Insurer organizations within HCAI, please see ***Chapter 9: Insurer Management***.

The User Administrator role is the only role allowed to access to the User Management module in HCAI. The User Administrator can create Users, assign roles, and grant domain access for organizations that he/she is allowed to manage. Once a User has been successfully created in HCAI, an email will be sent to the User providing his or her User ID and temporary password (if the email address has been provided). The User Administrator must notify the User manually regarding his/her User Name and password if no email address is available.

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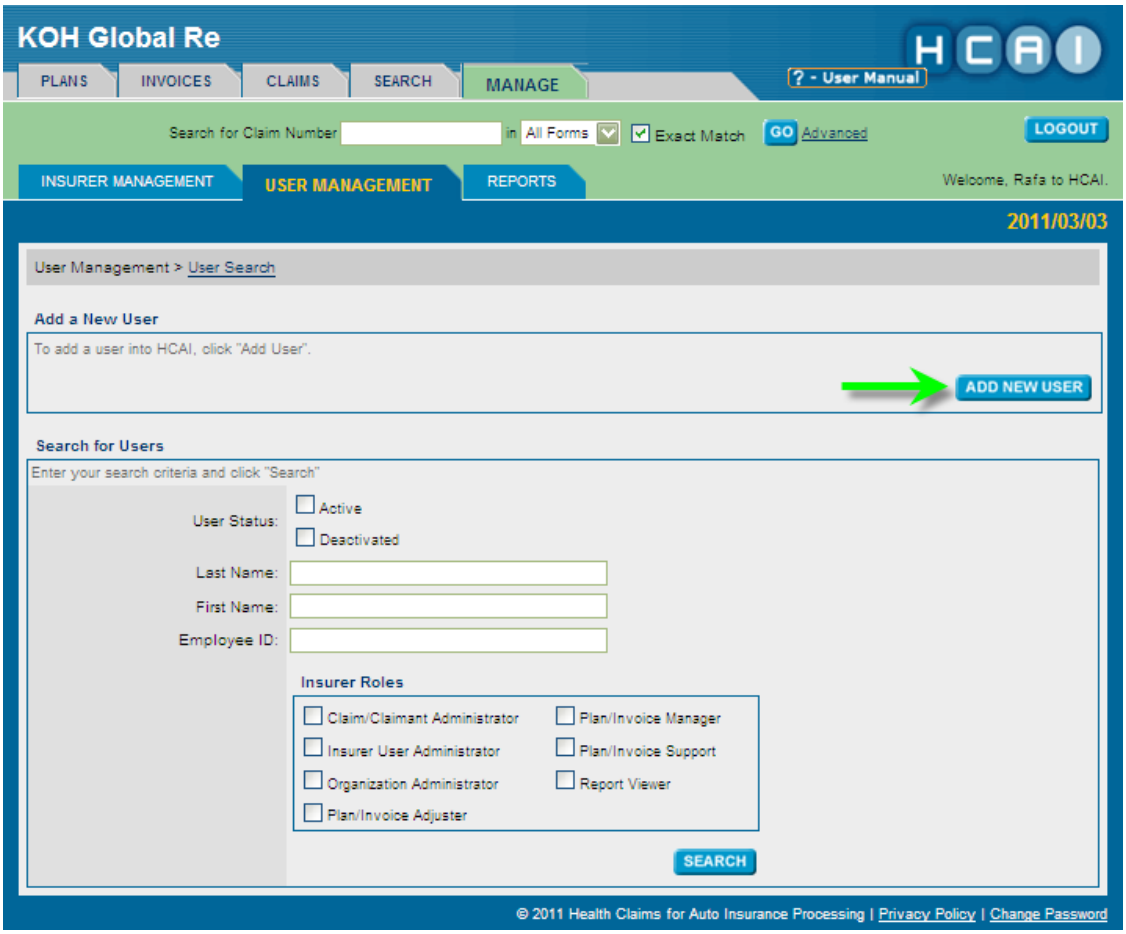
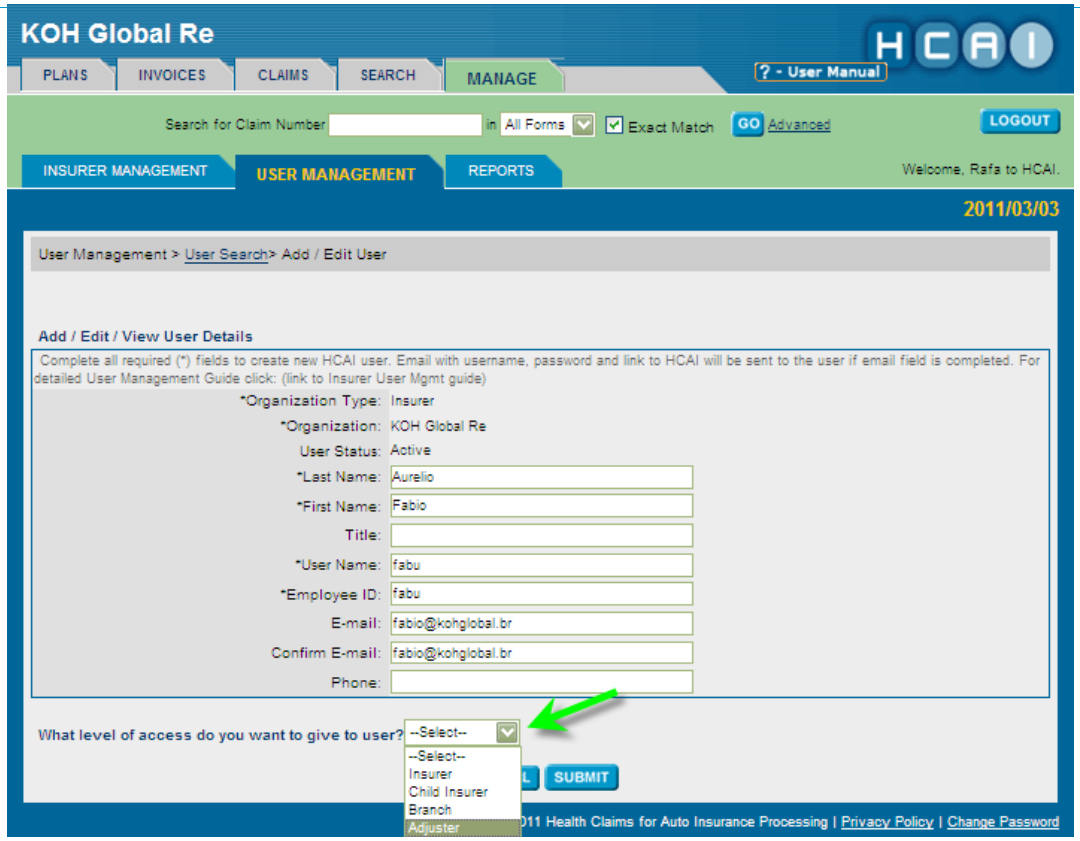
Adding a User

Only those Users assigned the User Administrator role are able to view the User Management tab and access the Add User functionality.

1. Click the Manage tab on the Insurer home page.
2. If the User Management tab is not the default selection, select it. *User Search* screen opens.
3. In the Add a New User section of this screen, click the ADD NEW USER button. The *Add/Edit User* screen appears.
4. Fill out the form provided in this screen. Fields marked with asterisks are mandatory.





5. Enter the User's last and first names in the respective fields.
6. Enter the title of the User in the "Title" field.
7. Specify a User Name for the User. This name is editable only on the first creation of the User account. After this, it is read-only for the lifetime of the account. The User Name is unique for each User; no User Name—even one that has been deactivated—can be reused by an organization.
8. Enter Employee ID. The employee ID is assigned by the Insurer.
9. Enter the User's phone number and email address in the respective fields. Both fields are optional. If provided, the email address will be used to send the User Name and Password to the User. If not specified, it will be the administrator's role to provide this information.
10. Specify the level of access to be assigned to the User.

Level of Access

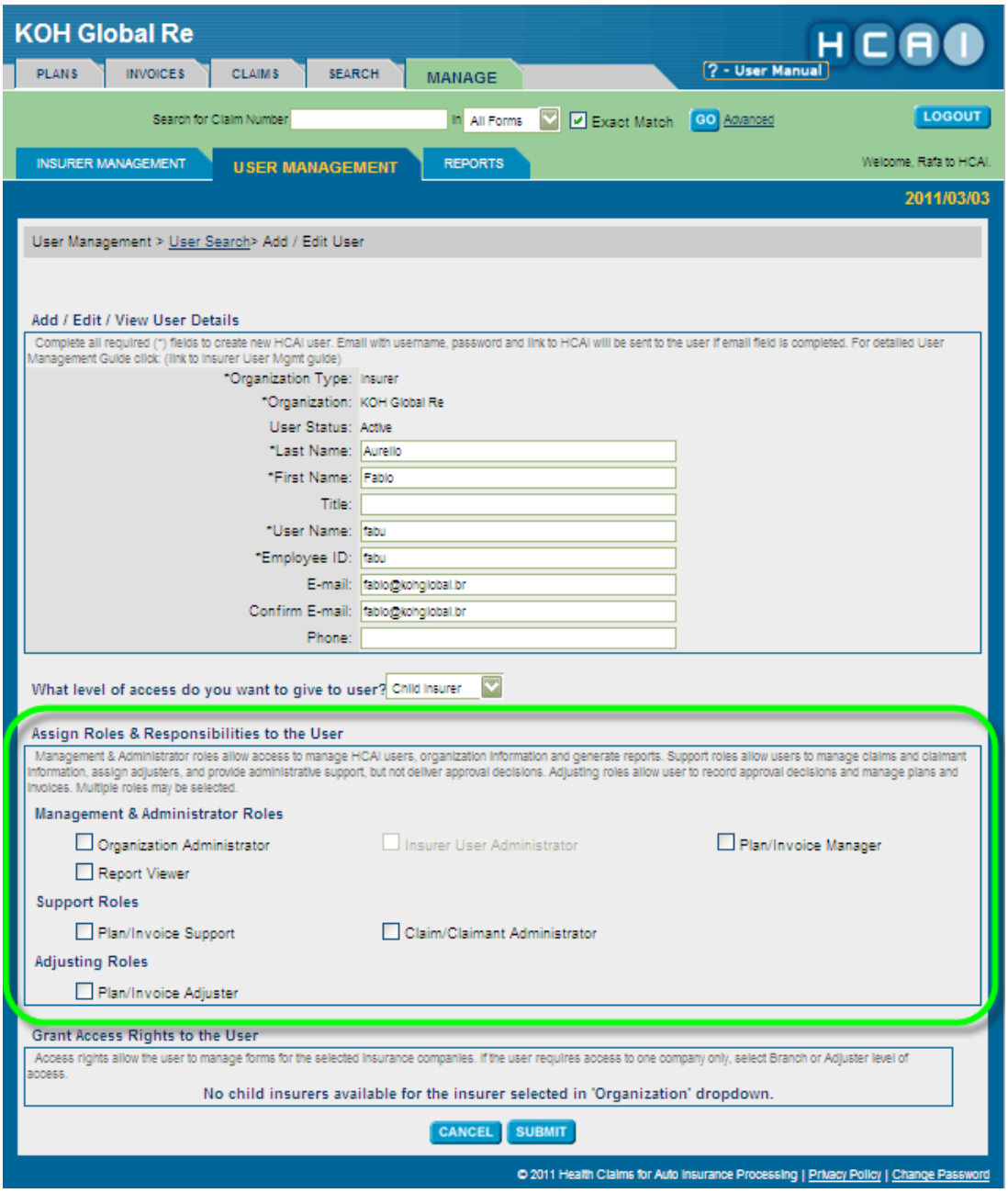
Descriptions for the different levels of access that can be assigned:

Insurer. A User with Insurer (parent) level access will be able to view details of all companies within the group. This level of access is usually assigned to Users who are performing User Administration, Organization Administration and Plan/Invoice Manger roles.

Child Insurer. A User with child insurer level access will be able to view details for the selected companies. This access is normally assigned to Users who perform Plan/Invoice Manager role.

Branch. A User with branch level access will be able to view details for the selected branches. This access is normally given to Users who perform tasks for a number of branches.

Adjuster. A User with Adjuster level access will be able to view details for the selected Adjusters.


KOH Global Re
PLANS
INVOICES
CLAIMS
SEARCH
MANAGE
? - User Manual
Search for Claim Number
In
All Forms
Exact Match
GO
Advanced
LOGOUT
INSURER MANAGEMENT
USER MANAGEMENT
REPORTS
Welcome, Rafa to HCAI.
2011/03/03
User Management > User Search> Add / Edit User
Add / Edit / View User Details
Complete all required (*) fields to create new HCAI user. Email with username, password and link to HCAI will be sent to the user if email field is completed. For detailed User Management Guide click: (link to Insurer User Mgmt guide)
*Organization Type: Insurer
*Organization: KOH Global Re
User Status: Active
*Last Name: Aurello
*First Name: Fabio
Title:
*User Name: fabu
*Employee ID: fabu
E-mail: fabio@kohglobal.br
Confirm E-mail: fabio@kohglobal.br
Phone:
What level of access do you want to give to user? Child Insurer
Assign Roles & Responsibilities to the User
Management & Administrator roles allow access to manage HCAI users, organization information and generate reports. Support roles allow users to manage claims and claimant information, assign adjusters, and provide administrative support, but not deliver approval decisions. Adjusting roles allow user to record approval decisions and manage plans and invoices. Multiple roles may be selected.
Management & Administrator Roles
Organization Administrator
Insurer User Administrator
Plan/Invoice Manager
Report Viewer
Support Roles
Plan/Invoice Support
Claim/Claimant Administrator
Adjusting Roles
Plan/Invoice Adjuster
Grant Access Rights to the User
Access rights allow the user to manage forms for the selected insurance companies. If the user requires access to one company only, select Branch or Adjuster level of access.
No child insurers available for the insurer selected in 'Organization' dropdown.
CANCEL
SUBMIT
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Once the level of access is determined, the roles and responsibilities sections will display the selections available and the grant access rights box will display the appropriate selections.

Assigning Roles and Responsibilities

Once you have selected the level of access, the screen will be refreshed with the Roles and Responsibilities. The roles available for the selection will coincide with the level of access chosen.

A list of the Insurer roles available within HCAI, along with a description of the tasks associated with each role is provided in the following table:

Roles	Tasks
Insurer User Administrator	View, create, update and search User Reset Password View Manage tab and User Management Sub Tab Deactivate/Activate Users
Organization Administrator	View and update Insurer View, create, and update Branch View, create and update Adjuster View Insurer Management Tab and Insurer Management Sub Tab Deactivate/Activate Insurers, Branches, Adjusters
Plan/Invoice Manager	View Plan/Invoices Search Document View Work list View Plan/Invoice, Search, Claim, Manage Tabs Reassign Document Branch Reassign Adjuster View, create, search and update Claim View, create, search and update Claimant Unlink & match Claimant from a Document View Insurer Claimant reports
Report Viewer	View and Print Insurer Reports View Manage Tab and Reports Sub Tab
Plan/Invoice Support	View Plan/Invoice Save work in progress for Plan/Invoice View EOB – View OCF-9 Search Document View Work list View Plan/Invoice and Search Tab View Insurer Claimant Reports
Claim-Claimant Administrator	View, create, search and update Claim View, create, search and update Claimant View Plan/Invoice Search for Document View Claims, Search & Manage Tabs View Claims & Claimant Sub Tab View Insurer Claimant Reports

Plan/Invoice Adjuster	View and submit response to Plan/Invoice Save work in progress for Plan/Invoice Take & release document ownership Match Claimant (if permitted by User's level of access) View, create, delete and update OCF-9 Search Document View Plan/Invoice, Search & Manage Tab Initiate Need to Discuss Respond to Need to Discuss Request Amend Plan Withdraw Plan/Invoice Response Place Plan/Invoice in Pending View Insurer Claimant Reports

Users can be assigned one role or multiple roles. The variety of roles available and the ability to assign multiple roles to a User provides Insurers with the flexibility to narrowly restrict the tasks that some Users are permitted to perform, while granting other Users broad access to functions within HCAI.

To assign roles and responsibilities to the User, click on the box beside the role to be assigned.

Grant Access Rights to User

The appropriate selections will be available based on the level of access you have chosen for the User.

Insurer. The User will have access to all information for the group of companies and no further input is necessary.

Child Insurer. Select the appropriate companies, by clicking on the box beside the company name.

> **Note:** this level will only appear if organization is set up as a group of companies.

Branches. Select the appropriate branches by clicking on the box beside the branch.

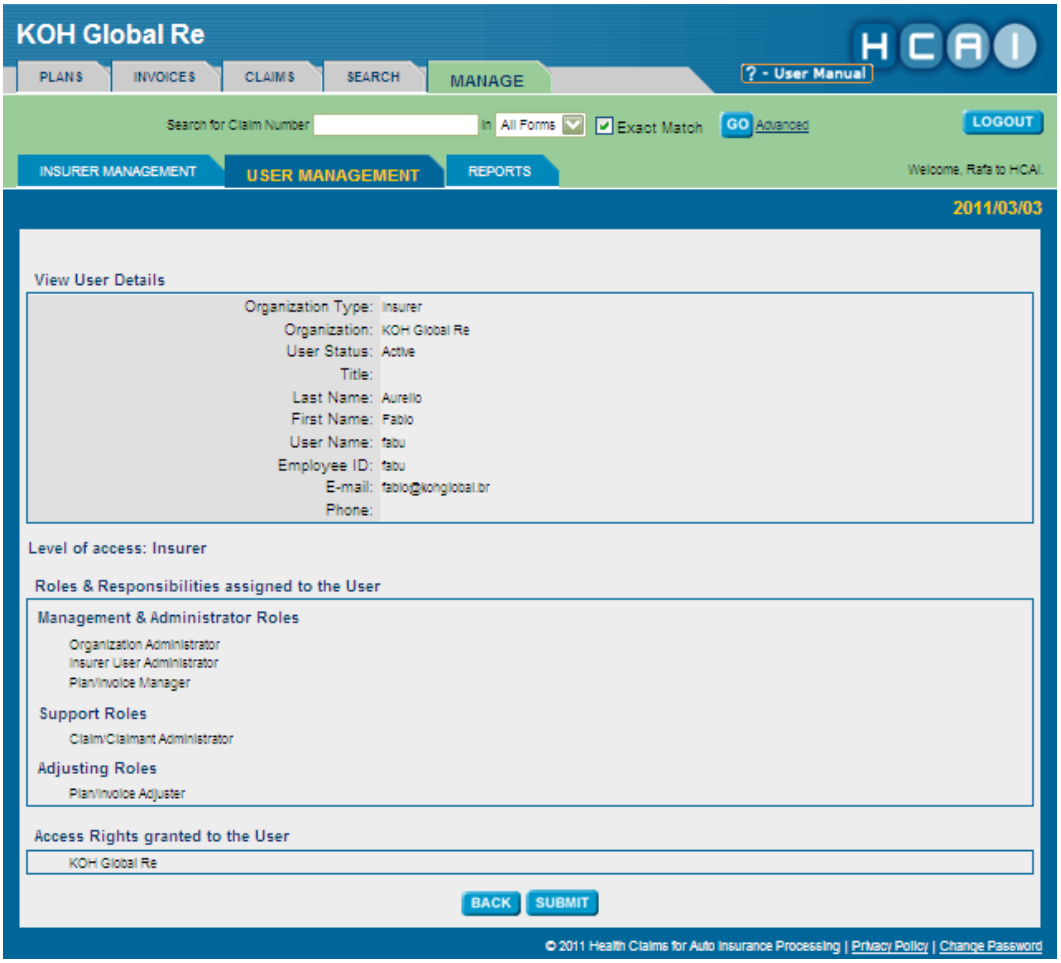
Adjuster. Select the appropriate Adjusters from the list, to select more than one Adjuster, press shift key and click on each Adjuster, click the > button to add the Adjusters to the list. To select all Adjusters click the >> button.

1. To remove an Adjuster, select the name from the list and click the < button. To remove all Adjusters use the << button.

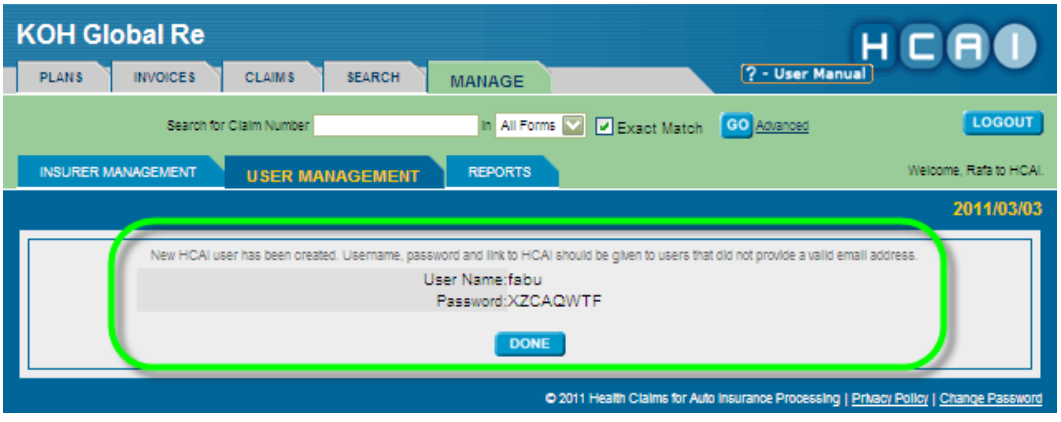
Saving a New User

Click SUBMIT in the bottom of the *Edit User* screen to save the User and his/her associated role and domain access in HCAI, a confirmation screen will appear, review the assigned access and click SUBMIT.

Once the User set-up is confirmed, you are returned to the form with a confirmation message stating that you have successfully added a new User and providing the User with a password. The User Name and password should be given to the new User unless the email address has been provided, in which case the Password will be sent directly to the User.



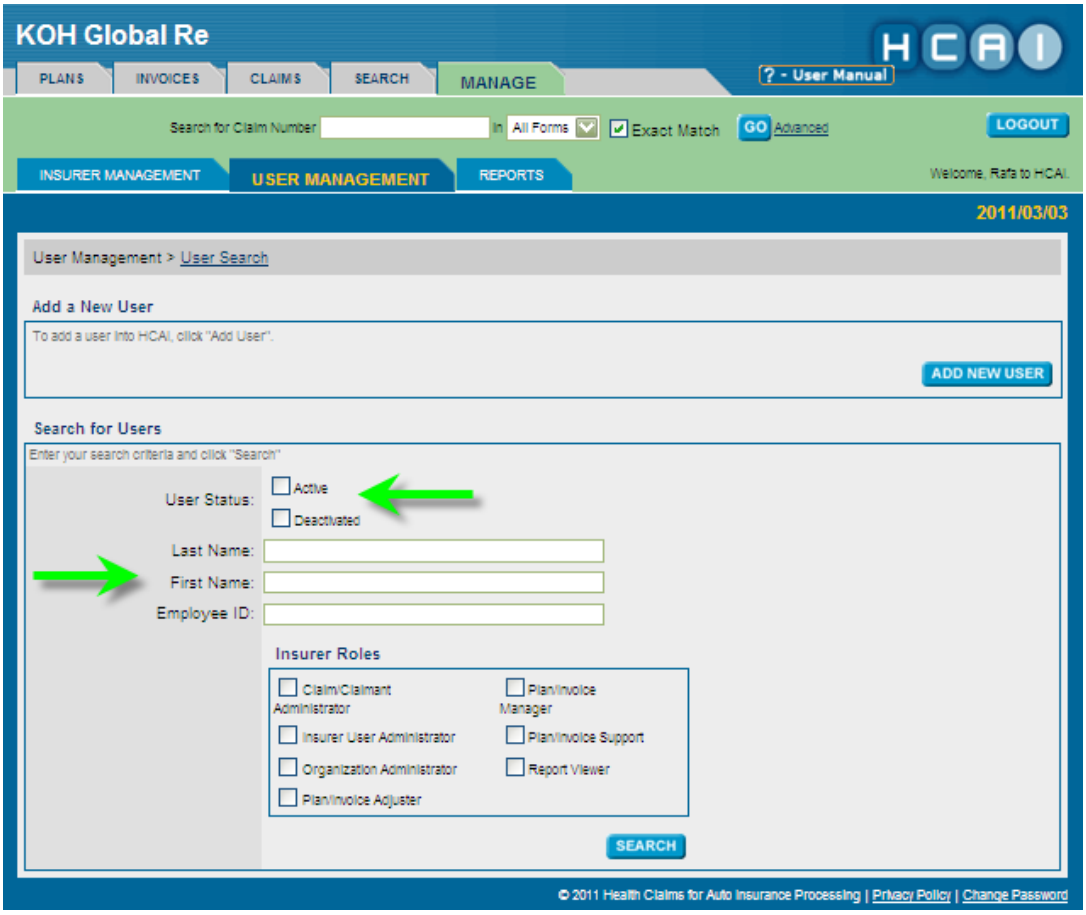
If the User Name you have chosen already exists, an error message appears at the top of the screen. You must then specify a new User Name.



If the data is invalid or incomplete, saving the User information fails and you are returned to the form with an error message displaying the field name and type of error.

Searching for a User

The User Search functionality is found in the User Management module, which is accessible from the Manage tab on the Insurer home page. Click the Manage tab. If the User Management tab is not the default selection, select it. The *User Search* screen displays.



In the Search for Users section, use any of the following search criteria:

User Status. Select one of the two boxes – "Active" or "Deactivated" – if you know the status of the User you are searching for.

Last Name. Enter at least one character in this field. (When searching by first name, the User must specify the last name.)

First Name. Enter at least one character in this field. When searching by first name, the User must specify the last name.

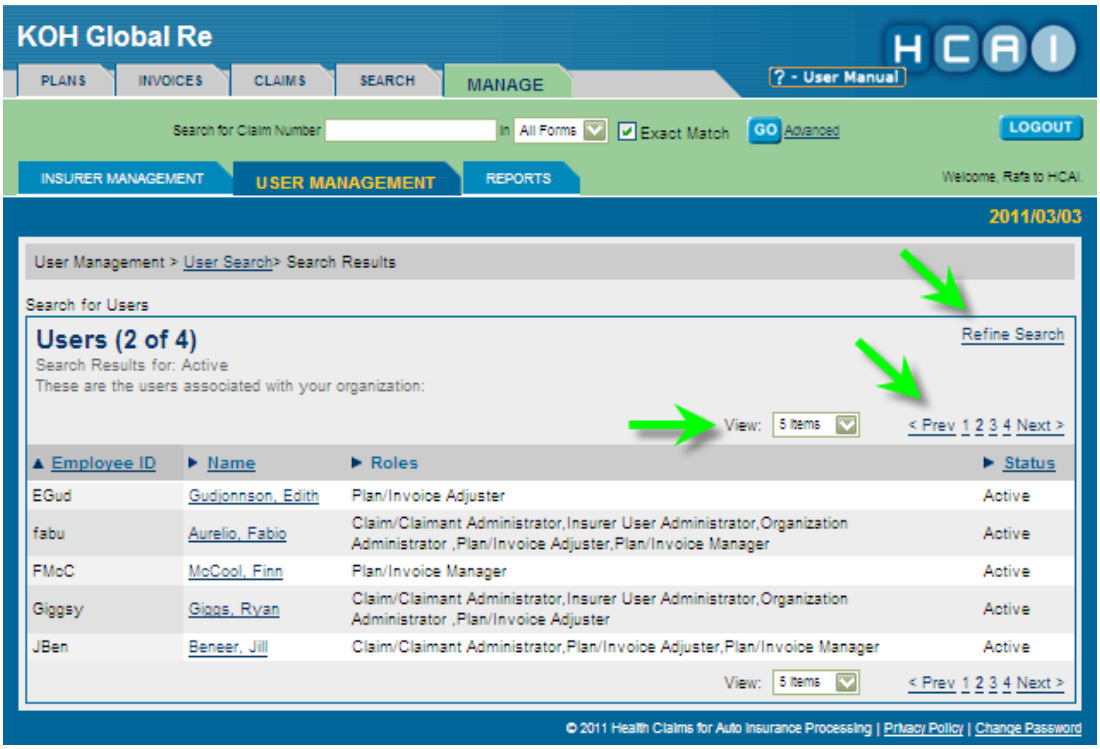
Employee ID. If known, this search criterion returns the direct result.

Click SEARCH. If there are any errors, an error message appears. Otherwise, you proceed to the *Search Results* screen.

> ⚠ **Note:** All searches are performed with a forward wildcard. Thus, searching for "A" is effectively "A*."

Viewing Search Results

The *Search Results* screen shows a list of Users determined by your search criteria and associated with your organization.



The default sort order of the Users is alphanumeric ascending by Employee ID. If there are multiple search results, they are divided onto several pages with the default number of line items displayed on each page restricted to 10.

To change the number of line items per page:

- Select the number of items from the "View" drop-down list to set the quantity of line items to be displayed on each page of the Search Results set.

To navigate in the multi-page search results:

- Click <Previous> or <Next> to move backward or forward through all the pages of the Search Results set.
- Use the page number links to move to a particular page of the search results.

To refine your search:

- Click the "Refine Search" text-link. This returns you to the *User Search* screen.
- Modify the data as required and click SEARCH.

To change the sort order of the search results list:

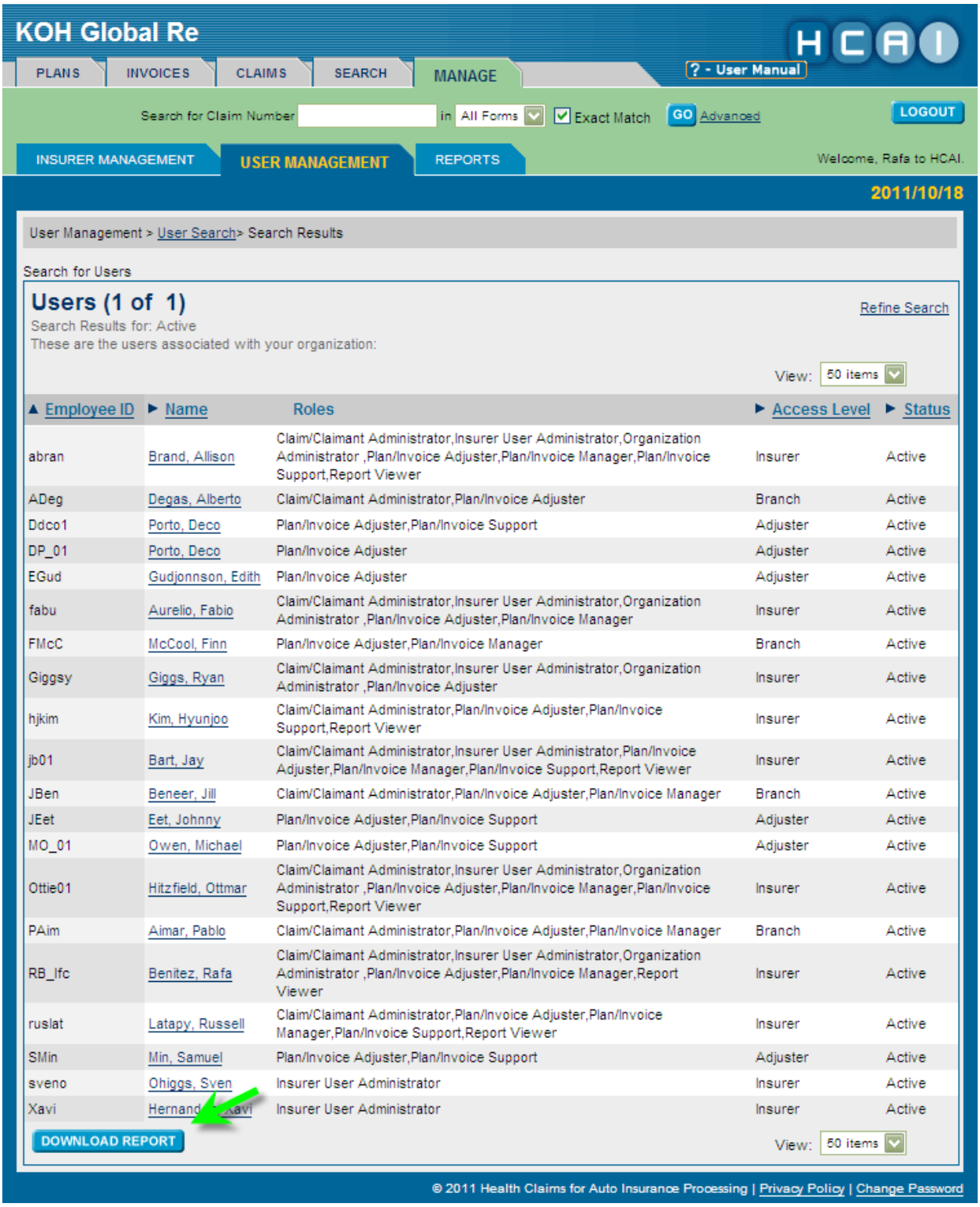
- Click on the "Employee ID" column header. This toggles the sort order from the default alphanumeric ascending to descending.
- Click on the "Name" column header to sort the results in ascending order by the User's name. Click again to switch to descending order. The secondary sort order is alphanumeric ascending by Employee ID.
- Click on the "Status" header to sort the results in ascending order by the status of the User. Click again to switch to descending order.

To view User details:

- Click on the User Name link in the "Name" column to proceed to the *Add/Edit User* screen.

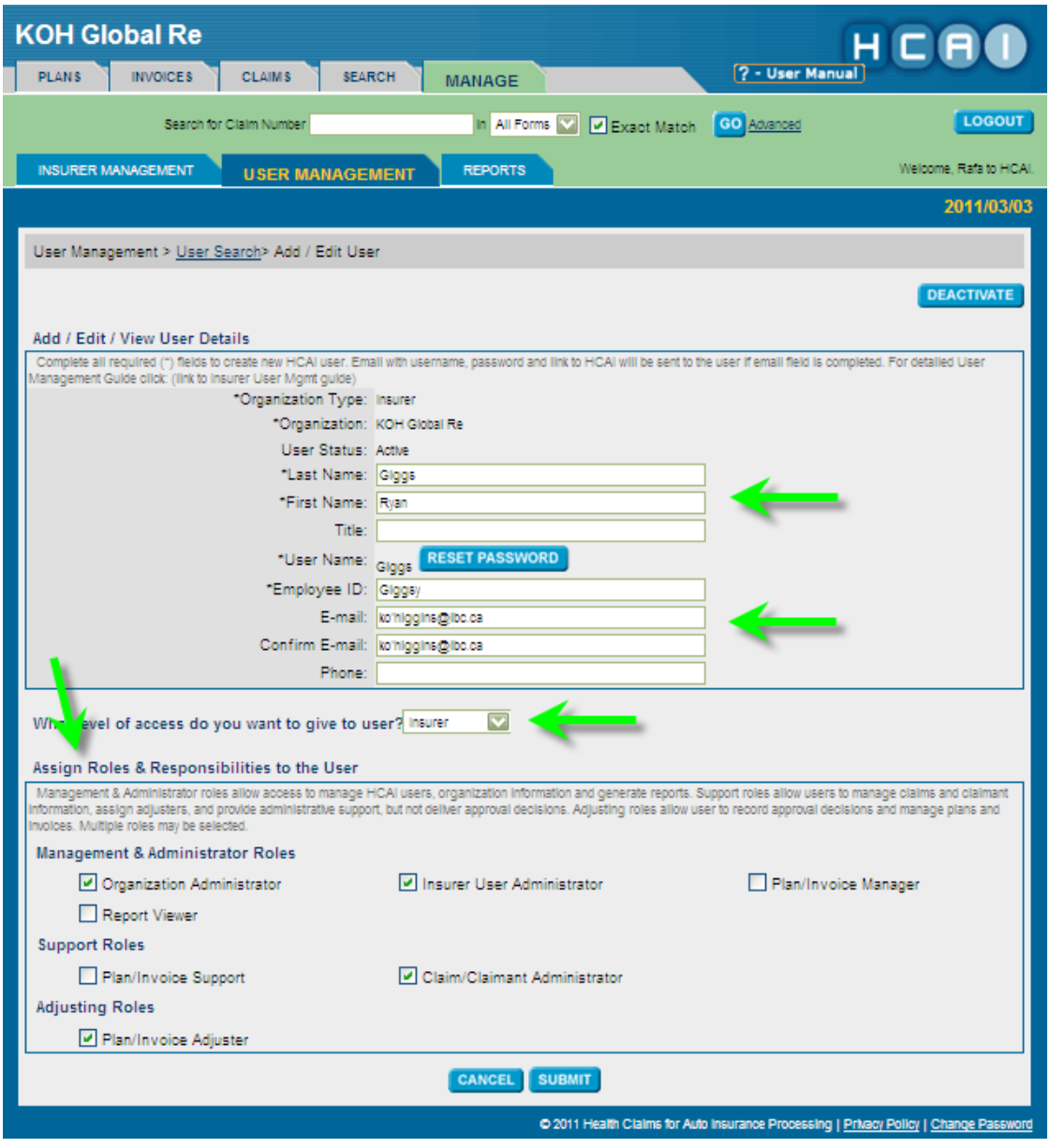
Download Search Report

This report enables a User to download results from the *User Search* > *Search Results* screen to a spreadsheet. The spreadsheet is a more detailed report than the web view of the search results and includes more information, such as the User Name, email address, phone number and Date of Deactivation for each user appearing in the search results.



Updating a User

Search for a required User as described in Searching for a User section. In the Search Results list, click on the User Name link in the “Name” column. This brings up the *Add/Edit User* screen.


KOH Global Re
PLANS
INVOICES
CLAIMS
SEARCH
MANAGE
? - User Manual
Search for Claim Number
In
All Forms
Exact Match
GO
Advanced
LOGOUT
INSURER MANAGEMENT
USER MANAGEMENT
REPORTS
Welcome, Rafa to HCAI.
2011/03/03
User Management > User Search> Add / Edit User
DEACTIVATE
Add / Edit / View User Details
Complete all required (*) fields to create new HCAI user. Email with username, password and link to HCAI will be sent to the user if email field is completed. For detailed User Management Guide click: (link to insurer User Mgmt guide)
*Organization Type: Insurer
*Organization: KOH Global Re
User Status: Active
*Last Name: Giggs
*First Name: Ryan
Title:
*User Name: Giggs
RESET PASSWORD
*Employee ID: Giggsy
E-mail: ko'niggins@ibc.ca
Confirm E-mail: ko'niggins@ibc.ca
Phone:
Wh evel of access do you want to give to user? Insurer
Assign Roles & Responsibilities to the User
Management & Administrator roles allow access to manage HCAI users, organization information and generate reports. Support roles allow users to manage claims and claimant information, assign adjusters, and provide administrative support, but not deliver approval decisions. Adjusting roles allow user to record approval decisions and manage plans and invoices. Multiple roles may be selected.
Management & Administrator Roles
Organization Administrator
Insurer User Administrator
Plan/Invoice Manager
Report Viewer
Support Roles
Plan/Invoice Support
Claim/Claimant Administrator
Adjusting Roles
Plan/Invoice Adjuster
CANCEL
SUBMIT
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In this screen, you can edit the User details in the “Last Name,” “First Name,” “Title,” “Employee ID,” “Email,” and “Phone” fields. You cannot edit the User Name; it is only editable on creation of the User account. After that, the User Name is read-only for the life of the account.

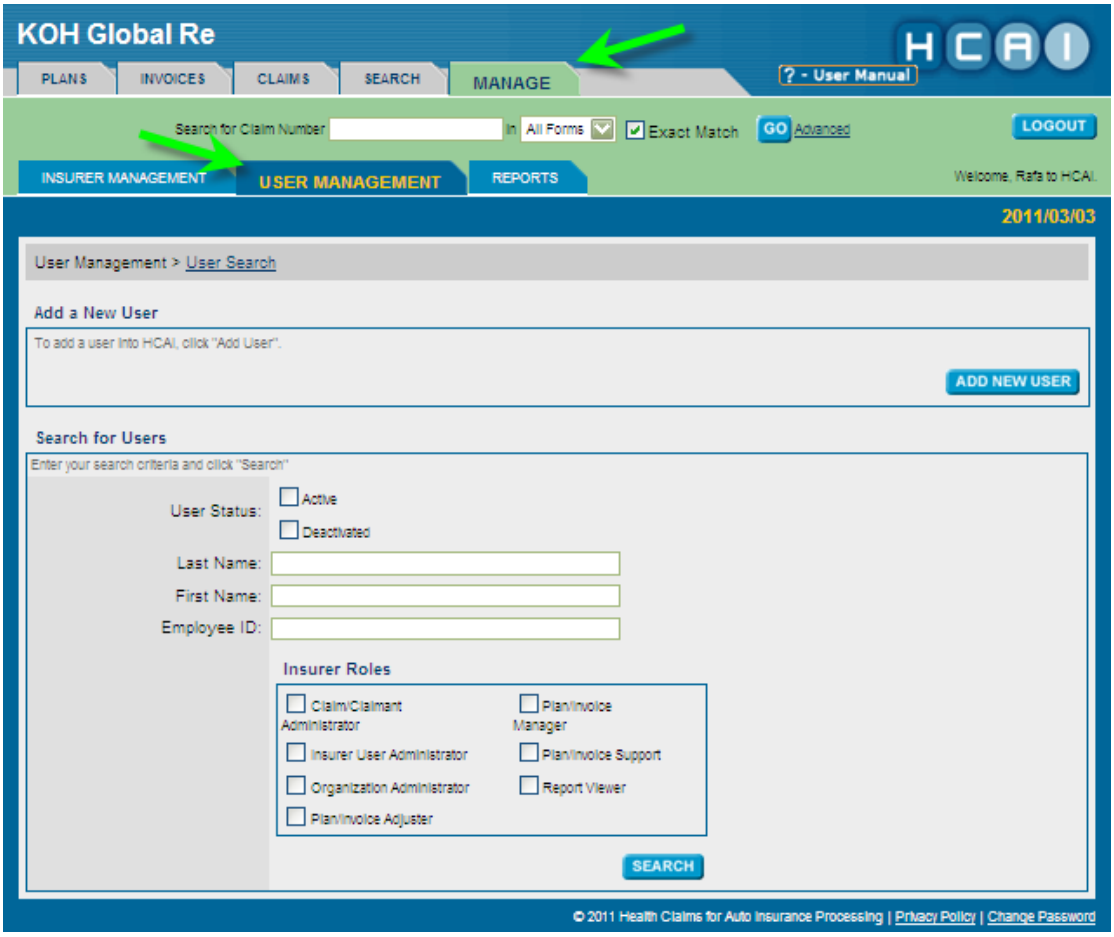
Level of access and roles can be edited.

- Input the appropriate changes and press the SUBMIT button; the confirmation screen will display, then review the changes and press SUBMIT again.
- A message will display that User has been successfully updated.

Resetting User Passwords

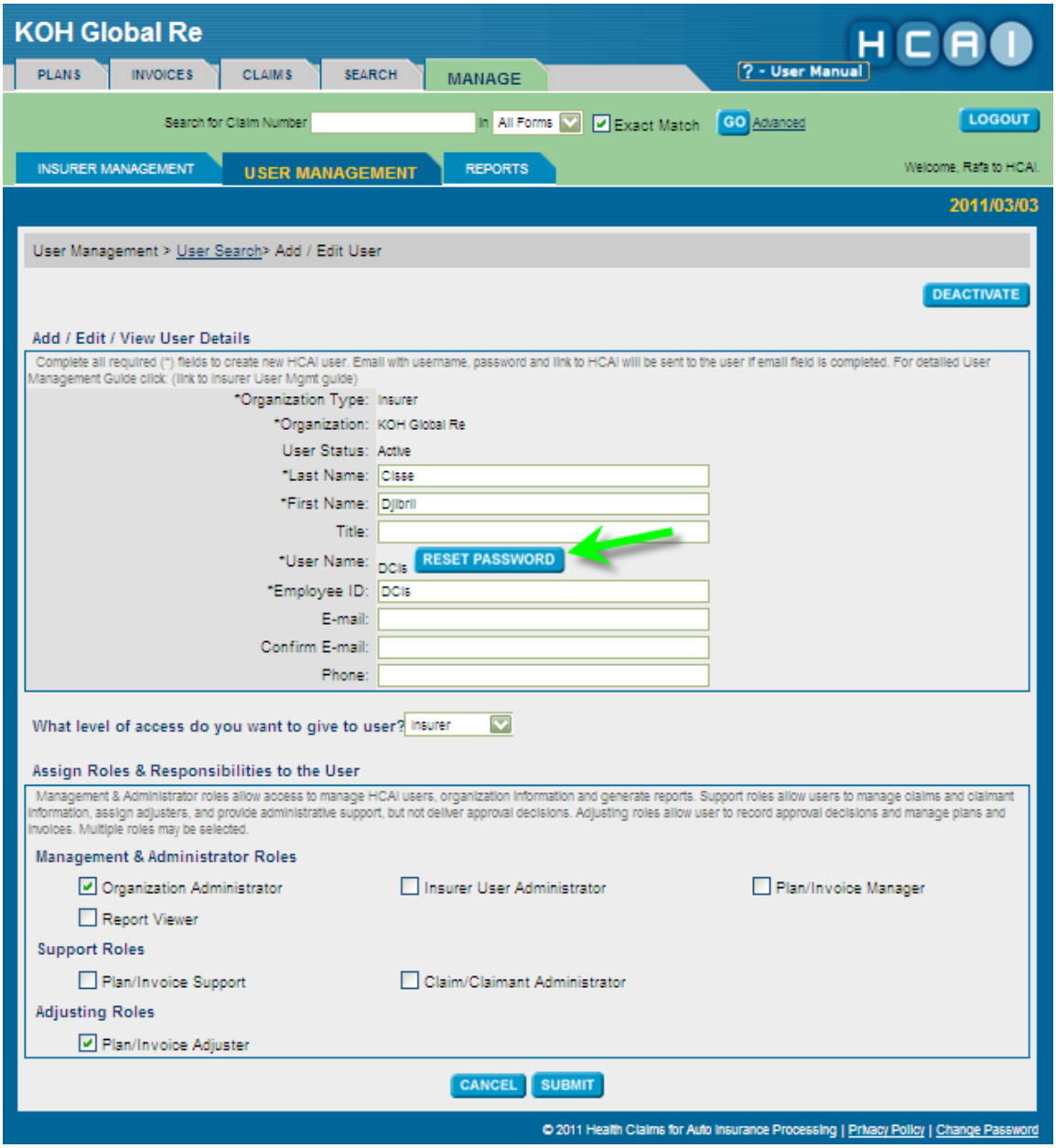
When a User is suspended from HCAI, the User Administrator for the Insurer can reset the User's password by:

1. Clicking on the Manage tab.
2. Clicking the User Management sub-tab.
3. Entering the User's name in the "Search for Users" section.
4. Once the User is located, click on his or her name to open the profile.
5. Hit the reset button located within the User's profile.



If the User Administrator has entered the User's email as part of his or her profile, the User will receive the temporary password automatically. When no email address has been provided, the User Administrator will contact the User and provide him or her with the temporary password.

6. Click RESET PASSWORD if you need to reset a User's password. The system generates a new password. If the password is the only update in this screen, you do not have to save. You will either provide the User with the new password or, if the email address has been provided, the new password will be sent directly to the User.


KOH Global Re
PLANS
INVOICES
CLAIMS
SEARCH
MANAGE
? - User Manual
Search for Claim Number
In
All Forms
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LOGOUT
INSURER MANAGEMENT
USER MANAGEMENT
REPORTS
Welcome, Rafa to HCAI.
2011/03/03
User Management > User Search> Add / Edit User
DEACTIVATE
Add / Edit / View User Details
Complete all required (*) fields to create new HCAI user. Email with username, password and link to HCAI will be sent to the user if email field is completed. For detailed User Management Guide click: (link to Insurer User Mgmt guide)
*Organization Type: Insurer
*Organization: KOH Global Re
User Status: Active
*Last Name: Cisse
*First Name: Djibril
Title:
*User Name: DCis
RESET PASSWORD
*Employee ID: DCis
E-mail:
Confirm E-mail:
Phone:
What level of access do you want to give to user? Insurer
Assign Roles & Responsibilities to the User
Management & Administrator roles allow access to manage HCAI users, organization information and generate reports. Support roles allow users to manage claims and claimant information, assign adjusters, and provide administrative support, but not deliver approval decisions. Adjusting roles allow user to record approval decisions and manage plans and invoices. Multiple roles may be selected.
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Organization Administrator
Insurer User Administrator
Plan/Invoice Manager
Report Viewer
Support Roles
Plan/Invoice Support
Claim/Claimant Administrator
Adjusting Roles
Plan/Invoice Adjuster
CANCEL
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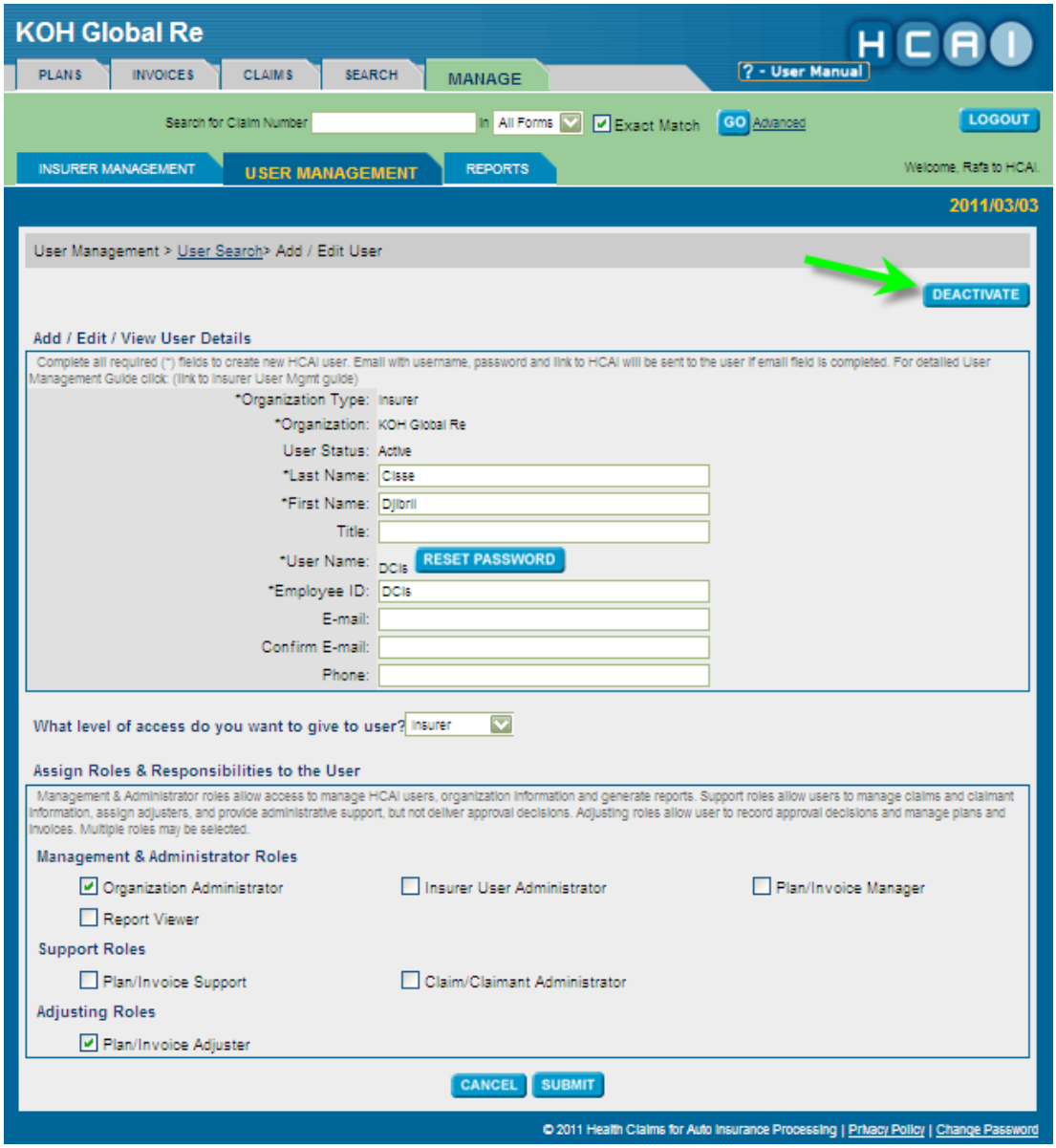
Deactivating/Reactivating a User

The Deactivate / Reactivate User functionality is found in the User Management sub tab, (located under the Manage tab). Click the Manage tab. If the User Management tab is not the resulting default selection, select it. The *User Search* screen opens.

To deactivate a User:

- Search for a required User as described in Searching for User section.
- In the Search Results list, click on the User Name link in the "Name" column. This brings up the *Add/Edit User* screen containing the User details:
- Click the DEACTIVATE button to deactivate the User. The dialog appears for you to confirm deactivation. Click <OK>. The screen refreshes. The message "User Deactivated" appears and the DEACTIVATE button is replaced by the ACTIVATE button. The User will no longer have access to HCAI.

> **Note:** Although the User is deactivated, his/her User Name cannot be reused within the HCAI system by any organization.


KOH Global Re
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*Organization Type: Insurer
*Organization: KOH Global Re
User Status: Active
*Last Name: Clase
*First Name: Djibril
Title:
*User Name: DClis
RESET PASSWORD
*Employee ID: DClis
E-mail:
Confirm E-mail:
Phone:
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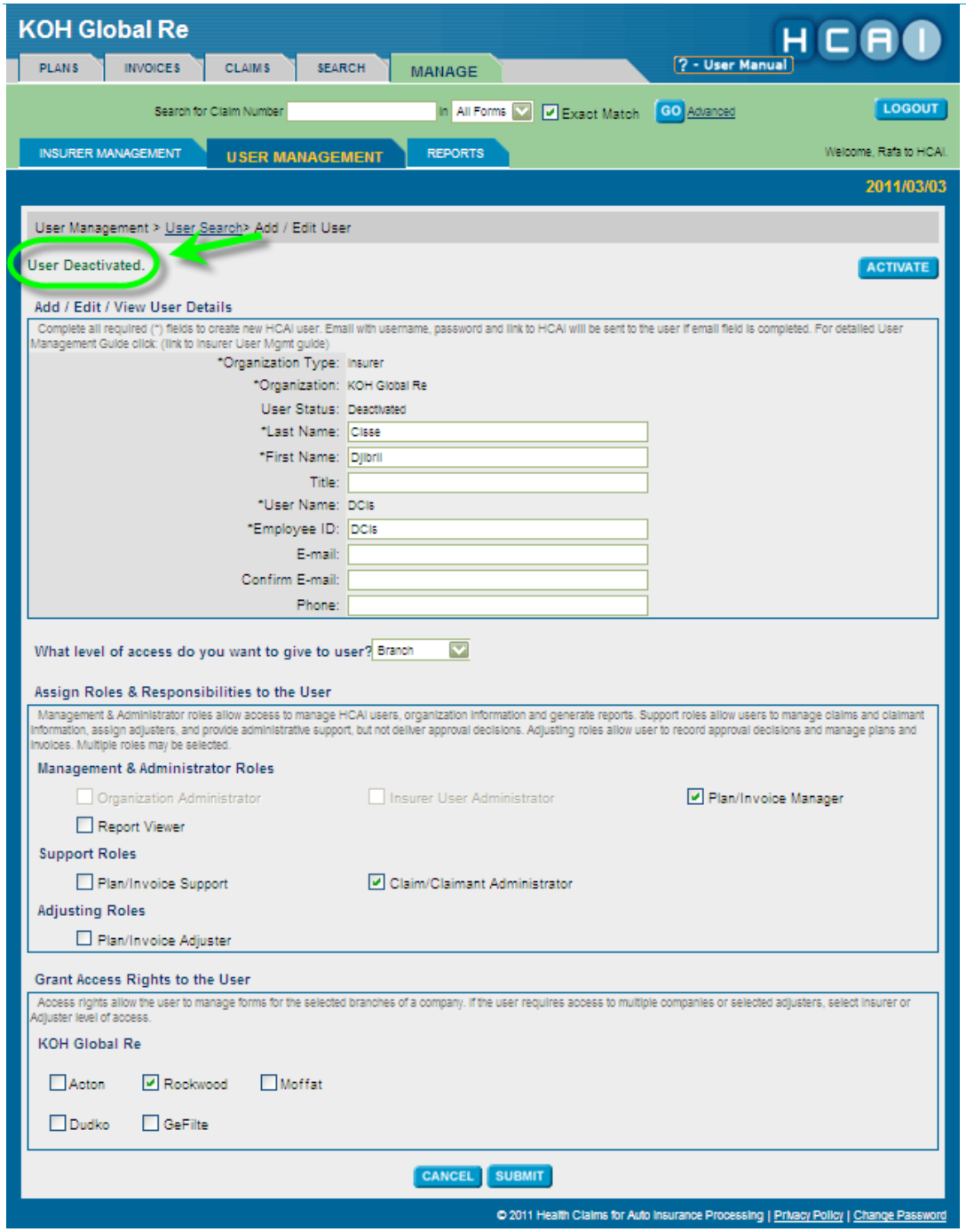
KOH Global Re
PLANS
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MANAGE
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Search for Claim Number
In
All Forms
Exact Match
GO
Advanced
LOGOUT
INSURER MANAGEMENT
USER MANAGEMENT
REPORTS
Welcome, Rafa to HCAI.
2011/03/03
User Management > User Search> Add / Edit User
User Deactivated.
ACTIVATE
Add / Edit / View User Details
Complete all required (*) fields to create new HCAI user. Email with username, password and link to HCAI will be sent to the user if email field is completed. For detailed User Management Guide click: (link to Insurer User Mgmt guide)
*Organization Type: Insurer
*Organization: KOH Global Re
User Status: Deactivated
*Last Name: Cisse
*First Name: Djibril
Title:
*User Name: DCis
*Employee ID: DCis
E-mail:
Confirm E-mail:
Phone:
What level of access do you want to give to user? Branch
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Insurer User Administrator
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Report Viewer
Support Roles
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Claim/Claimant Administrator
Adjusting Roles
Plan/Invoice Adjuster
Grant Access Rights to the User
Access rights allow the user to manage forms for the selected branches of a company. If the user requires access to multiple companies or selected adjusters, select Insurer or Adjuster level of access.
KOH Global Re
Acton
Rockwood
Moffat
Dudko
GeFilte
CANCEL
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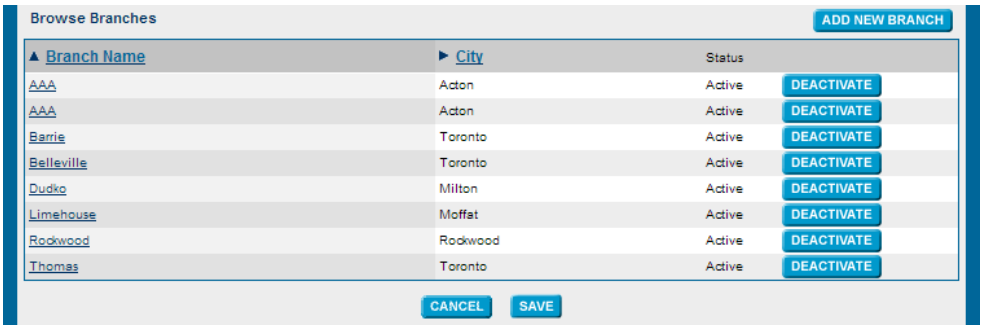
If a User with the role of Adjuster (Adjuster-User) has active claims/Claimants attached to his or her profile, the User Administrator will be unable to deactivate the User. Active claims/Claimants must either be adjudicated or transferred to another Adjuster for adjudication before the User Administrator can deactivate the User.

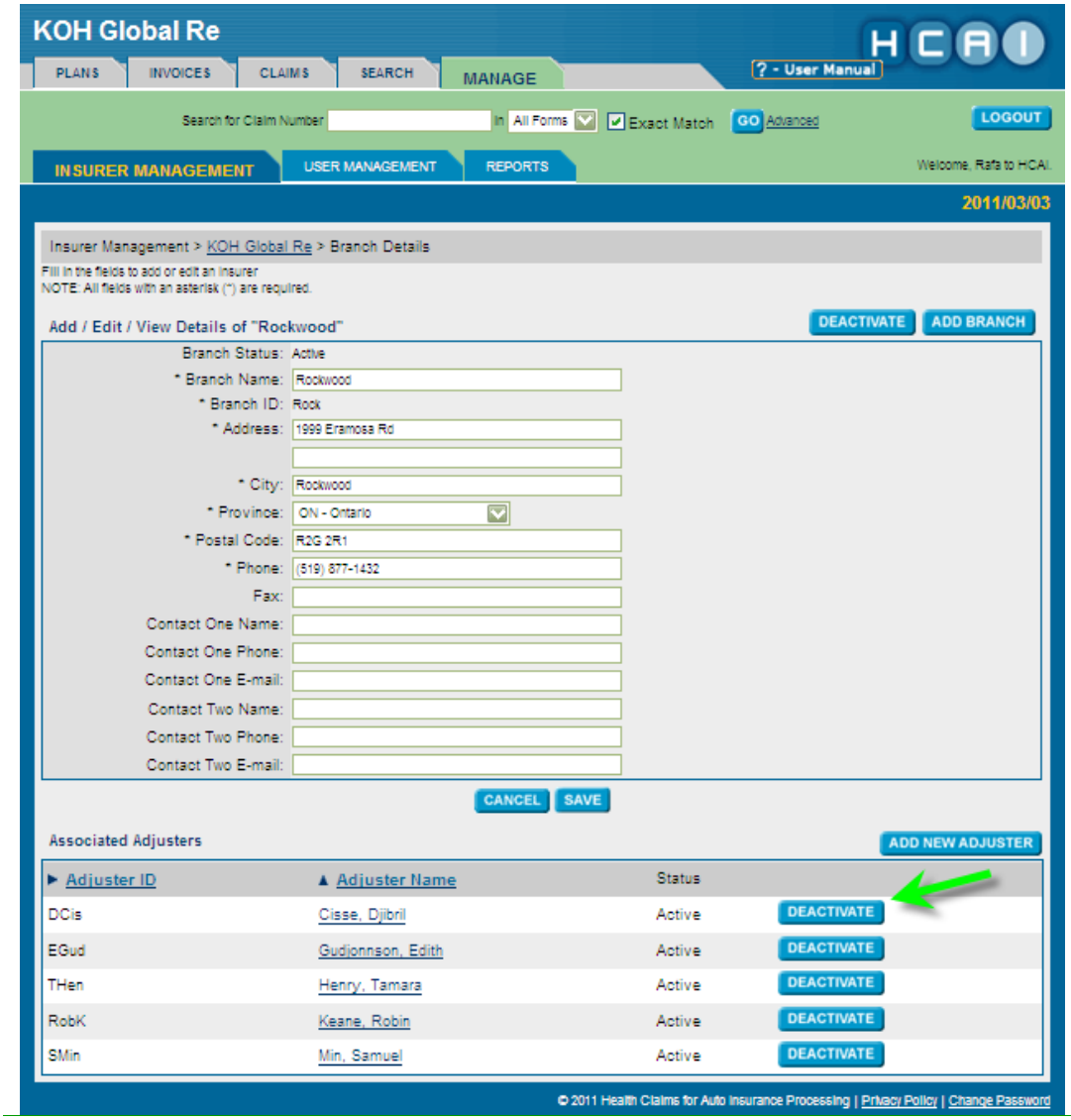
When a User Administrator deactivates an Adjuster-User by clicking the DEACTIVATE button in the *Add/Edit User* screen of the User Management sub tab, the User's profile in the Associated Adjusters section of the *Branch Details* screen must also be deactivated.

Likewise, when an Adjuster-User is deactivated by clicking the DEACTIVATE button located in the Branch Details screen of the Insurer Management sub tab, the User Administrator must also deactivate the User in *Add/Edit User* screen of the User Management sub tab.

To deactivate an Adjuster-User from the Insurer Management sub tab:



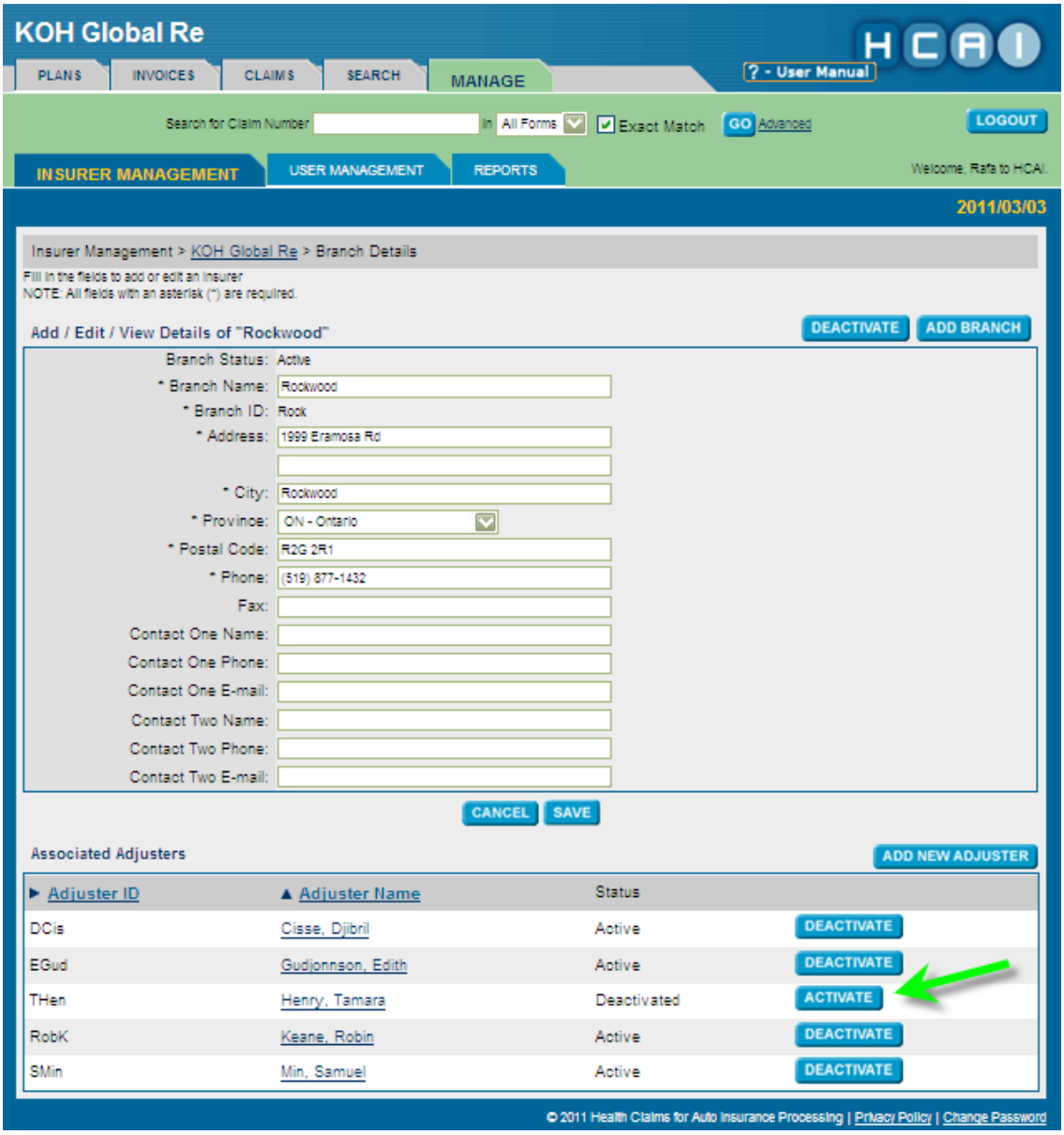
1. Click the branch for which the User to be deactivated is associated in the “Browse Branches” section. This will bring up the *Branch Details* screen.
2. Click the DEACTIVATE button on the same line of the Adjuster you wish to deactivate. The screen refreshes and the button has changed from DEACTIVATE to ACTIVATE.



To reactivate an Adjuster-User in the Insurer Management sub tab:

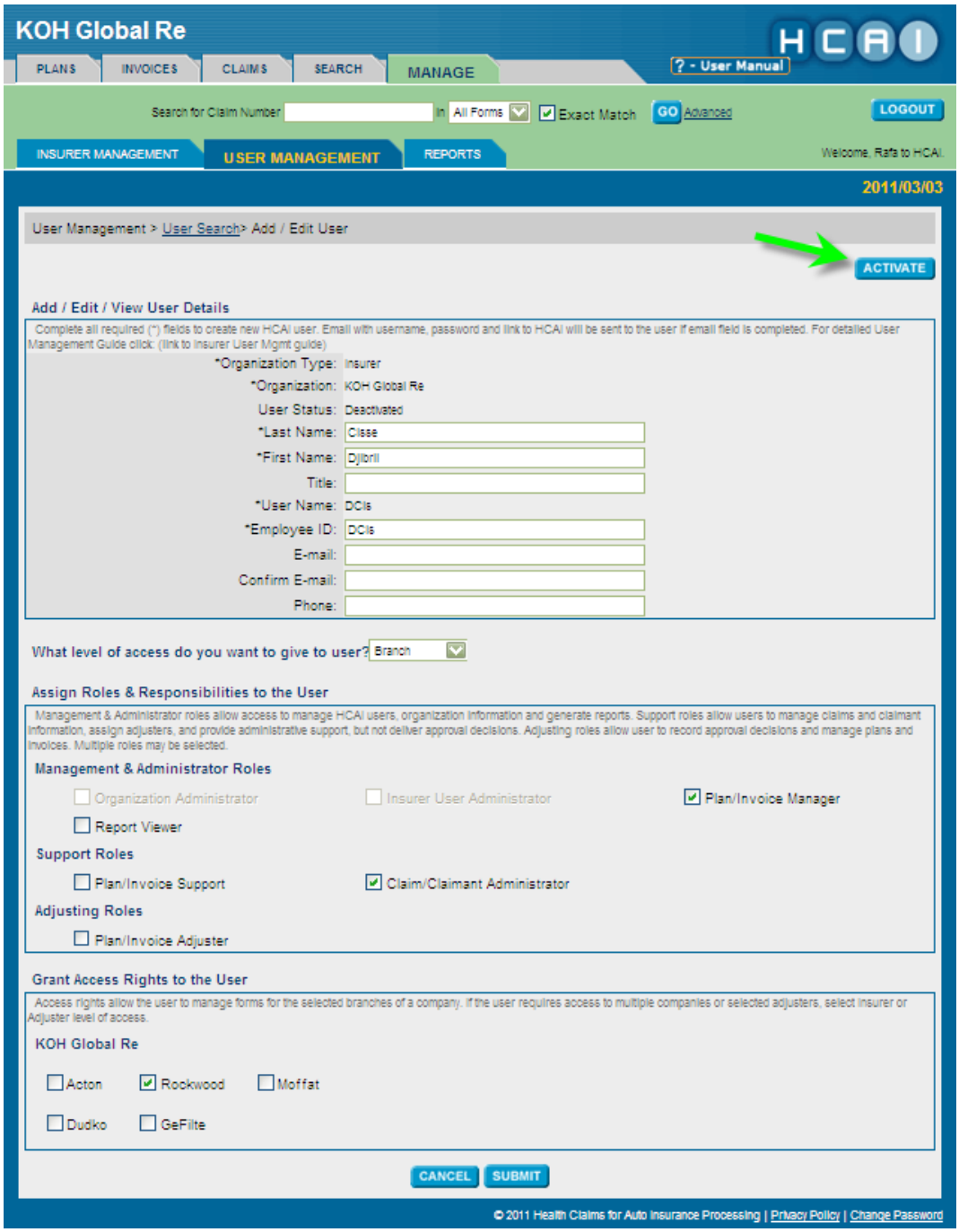
1. Locate the Branch to which the deactivated Adjuster is associated in the Browse Branches section of the Insurer Management sub-tab.
2. Click the branch name. The *Branch Details* screen appears.
3. Locate the deactivated Adjuster-User in the "Associated Adjuster" section.
4. Click the ACTIVATE button located on the same line of the Adjuster-User you wish to reactivate (next to the Status column in the "Associated Adjusters" section).

The screen refreshes and the Adjuster-User is now active. So as to ensure the Adjuster-User is active and can adjudicate claims, the User Administrator must go to the User Management sub tab, search for the User Profile of the recently activated Adjuster, and determine whether the Adjuster-User's profile is active.



To reactivate a User in the User Management sub tab:

1. Search for a required User as described in Searching for a User section.
2. In the Search Results list, click on the User Name link in the “Name” column. This brings up the *Add/Edit User* screen containing the User details.


KOH Global Re
PLANS
INVOICES
CLAIMS
SEARCH
MANAGE
? - User Manual
Search for Claim Number
In
All Forms
Exact Match
GO
Advanced
LOGOUT
INSURER MANAGEMENT
USER MANAGEMENT
REPORTS
Welcome, Rafa to HCAI.
2011/03/03
User Management > User Search> Add / Edit User
ACTIVATE
Add / Edit / View User Details
Complete all required (*) fields to create new HCAI user. Email with username, password and link to HCAI will be sent to the user if email field is completed. For detailed User Management Guide click: (link to Insurer User Mgmt guide)
*Organization Type: Insurer
*Organization: KOH Global Re
User Status: Deactivated
*Last Name: Cisse
*First Name: Djibril
Title:
*User Name: DCis
*Employee ID: DCis
E-mail:
Confirm E-mail:
Phone:
What level of access do you want to give to user? Branch
Assign Roles & Responsibilities to the User
Management & Administrator roles allow access to manage HCAI users, organization information and generate reports. Support roles allow users to manage claims and claimant information, assign adjusters, and provide administrative support, but not deliver approval decisions. Adjusting roles allow user to record approval decisions and manage plans and invoices. Multiple roles may be selected.
Management & Administrator Roles
Organization Administrator
Insurer User Administrator
Plan/Invoice Manager
Report Viewer
Support Roles
Plan/Invoice Support
Claim/Claimant Administrator
Adjusting Roles
Plan/Invoice Adjuster
Grant Access Rights to the User
Access rights allow the user to manage forms for the selected branches of a company. If the user requires access to multiple companies or selected adjusters, select Insurer or Adjuster level of access.
KOH Global Re
Acton
Rockwood
Moffat
Dudko
GeFilte
CANCEL
SUBMIT
© 2011 Health Claims for Auto Insurance Processing | Privacy Policy | Change Password

3. Click the ACTIVATE button to reactivate the User. The screen refreshes.

   The message “User Activated” appears, and the ACTIVATE button is replaced with the DEACTIVATE button. The User will now have access to HCAI.